PLANNING & COMMUNITY DEVELOPMENT
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JAMES RAUSSE, FAICP, WEDG
COMMISSIONER

August 7, 2025

VIA EMAIL:
Honorable City Council Members
City of Mount Vernon
1 Roosevelt Square
Mount Vernon, New York 10550

RE: Request for the City Council to enact legislation to authorize the Mayor to execute a Contract Amendment with the Cities for Financial Empowerment Fund to incorporate Legacy Planning Services into the Mount Vernon Financial Empowerment Center. For consideration on the agenda at the August 13th, 2025, City Council meeting.

Dear Honorable Members of the City Council,

I am writing to respectfully request that the City Council enact legislation authorizing the Mayor to sign a contract amendment with the Cities for Financial Empowerment Fund (CFE Fund) that will update the existing Financial Empowerment Center (FEC) Implementation Grant Agreement. This amendment will allow the City of Mount Vernon to expand the FEC's service offerings to include Legacy Planning services for residents.

The amendment, titled **"**First Grant Amendment," dated June 1, 2025, modifies the original agreement dated February 1, 2024, and provides an additional $50,000 to support the integration of Legacy Planning into the City's FEC program. The funds will be deposited in Revenue Code A2705.1 Gifts and Donations. These additional funds will enhance the City's ability to help residents plan for the future, including support for wills, beneficiary designations, estate planning education, and intergenerational asset preservation.

Key updates to the contract include:

- Extension of the contract term through May 31, 2027 to accommodate a two-year implementation period for Legacy Planning services;
- Addition of new disbursement conditions tied to deliverables and reporting requirements for Legacy Planning Year 1 (June 2025–May 2026) and Year 2 (June 2026–May 2027);
- Updated Scope of Work, Model, and Budget Exhibits (B, C, and D) to reflect expanded programming and use of funds, which may include staffing, counselor training, stakeholder events, administrative support, and community outreach;
- A revised disbursement schedule of $25,000 in Year 1 and $25,000 in Year 2, including progress-based benchmarks and documentation requirements.

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This amendment aligns with the City's goals to expand access to financial empowerment services and help residents secure long-term financial stability through legacy planning.

Attached for your review is the proposed First Grant Amendment and supporting documentation.

We appreciate your consideration of this request and stand ready to provide additional information or respond to any questions you may have.

Sincerely,

JAMES RAUSSE, FAICP, WEDG

cc: Mayor Shawyn Patterson-Howard
Comptroller Darren M. Morton
Malcolm Clark, Chief of Staff